What is Clover Go?

• Clover Go is a credit and debit card processing app

• Allows individual girls and troops to accept credit cards during the entire Girl Scout Cookie Program

• GSEM and GSUSA are partnering with Fiserv to offer the Clover Go App to all Cookie Bosses when a troop signs up

• Funds deposit directly to the troop’s bank account

• GSEM will cover all processing fees
What is Clover Go?

Clover Go App is for payments on the go

**TROOPS**
Use at cookie booths with single login on multiple devices

**GIRLS**
Take payments from family and friends when delivering orders in-person
How are payments taken?

**Free Clover Go App**
- Optical Card Reader (OCR)
- Key in Card Information Manually

**Optional Clover Go Card Reader**
- Swipe, Dip or Tap
- Also accepts Apple Pay, Android Pay or Samsung Pay

* Troop responsible for cost of the reader
Where does the money go?

• Card transactions are automatically deposited to the troop’s bank account each night

• TCMs use their Clover account to monitor transactions

• TCMs should regularly check the troop’s bank account to verify deposit of funds

• TCM records girl Clover transactions in eBudde
Clover Go Troop Boarding

** Upon completion of this next portion of the training, you will receive instructions on how to request the Clover onboarding link
Troop Boarding – Troop Information

- Click the onboarding link received after completing the instructions at the end of this training
- The first screen will ask you to login to your MyGS account to proceed with onboarding
- Enter Troop Number as “GSEM Troop xxxx”
- Enter your name and email address
- Information may auto populate, but can be updated if incorrect
- Complete this page for each troop you need to set up

Signup to accept card payments.

Please provide the following information to register your Troop.

Troop Information

- Troop Number
  - Troop 11801
- Leader Name
  - Test Troop
- Leader Email Address
  - test.troop@gmail.com
- Re-enter Leader Email Address
  - test.troop@gmail.com
Troop Boarding – Bank Information

- Enter your troop bank account routing number and account number
- All items purchased will be credited to this account
- If the troop opts to purchase a Clover Go reader, this cost may be debited from this account.
Troop Boarding – Equipment

• Select your equipment preference
• Clover hardware is non-refundable
• All shipped items will incur a $10 shipping fee

Recommended:
No device required. No cost to download the Clover Go App.

Optional:
At troop’s expense

- Clover Go App and Contactless Reader - $39.95
- Clover Go App and Contactless with Clip - $49.94
- Clover Go App and Contactless with Stand and Clip - $75.93
- Clover Go App and Contactless Reader with Stand - $69.94
Troop Boarding – Confirmation Page

- Verify that all information is correct
- Click Back Troop Info to make any corrections
- Click Submit once verified

### Confirmation

Please review the information below.

<table>
<thead>
<tr>
<th>1. Council Information</th>
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</thead>
<tbody>
<tr>
<td><strong>GSEM Troop 123</strong></td>
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<tr>
<td>Legal Business Name</td>
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<tr>
<td>Legal Contact Name</td>
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<tr>
<td>Business Address</td>
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<tr>
<td>Suite #</td>
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<tr>
<td>City</td>
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<tr>
<td>State</td>
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<tr>
<td>ZIP</td>
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<tr>
<td>Business Phone</td>
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<tr>
<th>2. Troop Information</th>
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<tbody>
<tr>
<td><strong>GSEM Troop 123</strong></td>
</tr>
<tr>
<td>Business Address</td>
</tr>
<tr>
<td>Troop Leader Name</td>
</tr>
<tr>
<td>Processing Email Address</td>
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<td>State</td>
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<tr>
<th>Banking &amp; Funding Information</th>
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<td>ABA #</td>
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<td>DDA #</td>
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<tr>
<th>Product Details</th>
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<tr>
<td>MODEL CODE AND NAME</td>
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<td>------------------</td>
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<td>Glider Go App</td>
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</tbody>
</table>

Only the applicant may check the box below.

I agree the above information is correct. As Troop Leader I acknowledge that the Council appointed administrator shall be the administrator for this account. After submitting, the Council administrator is the only person authorized to modify the Troop Leader and other information in this account upon written notice to First Data.
Troop Boarding – Welcome Emails

• Within 48 hours of submitting the troop boarding form above you will receive two emails from Clover

• First email is a confirmation of your submission and needs no further steps

• Second email contains the link to verify your email and set up your account

• Follow the instructions to create your account
You’re ready for your Clover onboarding link!

- Email answercenter@girlscoutsem.org with the subject line: I’m Clover Ready!
- In the body of the email, include the troop number(s) joining Clover
- You should receive the onboarding link within two (2) business days
- Once you receive your link, click the link to onboard your troop(s)
- Refer to the slides above for help as needed
- Continue to Clover Go Troop Set Up training for next steps
Clover Go Troop Set Up
Troop Set Up – Username and Password

- Once you’ve created your password at the link provided to your email, you can log in to www.clover.com
- Enter your email address and the password created to access your Clover Dashboard
- **If you did not receive, or cannot find, the welcome email, click “Forgot password”**
If your email is associated with more than one troop account, you can toggle between them through a drop down menu.

Click your name to access account settings or log out.
Troop Set Up – Address Confirmation

• Click Setup on the left menu bar

• Click Business Information

• Ensure that the Business Name, Address, and Phone Number are present

• Your Troop # should be the Business Name and the Address should be the Council office, not the volunteer’s

• This information will appear on a customer’s receipt
Troop Set Up – Update Council Logo

• Update the logo to the GSEM service mark so it shows appropriate branding on all receipts

• Right click on GSEM logo under Clover menu at https://www.girlscoutsem.org/en/cookies/about-girl-scout-cookies.html and save file to your computer

• Go to Business Information under Setup and Choose your saved file to upload.
Troop Set Up – Add Inventory

- Click Inventory on the menu bar
- Click +Add New Item
- Type “$5 Girl Scout Cookie” as the Name of your first inventory item
- Check Show in Register
- Add $5 price as Fixed
- Key in Category name “Cookie Program”
- Make sure no taxes
- Hit Save
- Repeat process above for second inventory item—“$6 Girl Scout Cookie”, with a $6 price as Fixed, and be sure to hit Save
- There’s no need to put each individual variety in inventory
Troop Set Up – Allow Notes

- Click Orders under Setup on the left menu bar
- Check Allow notes on orders
- This ensures Payment Notes display on reports so girls can notate which sales were made at booths
Troop Set Up – Group Line Items

- Click Order Receipts on the menu bar
- Check Group line items
- This ensures same items are grouped together on receipts
Troop Set Up – Disable Offline Payments

- Offline payments are not permitted
- Offline payments are those taken when not connected to a network
- This option should be disabled to protect the troop from loss
- Click Payments on the menu bar
- Click Edit under Offline Payments
- Select Do not allow offline payments
- Click Save
Troop Set Up – Turn Off Tips

- Click Tips on the Menu Bar
- Ensure that Ask for Tips is not checked
Troop Set Up – Shorten Passcode Length

- Click Employees, then Setup on left menu bar
- Default setup for new accounts is a 6-digit passcode
- Update to 4-digits so it’s easier for girls to remember
- Click Change under Passcode Length
- Check Require a Passcode to log in to your Clover devices
- Troop volunteer can access passcode if girls forget
Troop Set Up – Customize Receipt

• Click Payment Receipts under Setup on menu bar

• Customize receipt header and footer information, as desired
  
  o For example, you could say “Thank you for powering amazing experiences for girls”

• Check Show logo on payment receipts

• Select Use business logo when printing receipt

• Cashier name should not be checked
Troop Set Up – Add Council Admin

• Each troop is REQUIRED to enter a Council Administrator in Clover

• Select Employees in menu bar

• Click + Add New Employee
  o Full Name = Amy Burchardt
  o Email = aburchardt@girlscoutsem.org
  o Role = Admin
Troop Set Up – Add Girl Users

Each Clover account must have a unique email address. There are several workarounds to help get all girls added, which are outlined on the next slide.

1. Select Employees in menu bar to add/change/delete girls and administrators
2. Click + Add New Employee
3. Enter Full name and email address for each girl
4. Enter First Name and Last Initial in Nickname box, as this is what will appear on customer receipts
5. Assign Manager role to each girl so she can issue refunds if necessary
6. Click Save
7. The girls’ families will receive an email to verify their email and password
8. Families can then activate the Clover Go App on their own devices
Troop Set Up – Girl Email Addresses

If a family has multiple Girl Scouts, or the troop leader and her Girl Scout(s) use the same parental email address, here are a few work-around options

- **If you are a troop leader or cookie manager with admin credentials**, your girl can sell in your Clover account. Admins can still make sales. Whoever looks at reporting later will just need to understand that these transactions showing up in your name should be credited to your Girl Scout.

- **If you have multiple Girl Scouts in the same troop**: One girl can use one guardian’s email, one girl can use another guardian’s. If you have a work email or secondary email, you can use that for one girl and your primary email for the other.

- **If you have multiple girls, but they are in different troops**: You can create a single, shared Clover Account (name: “Betty and Sally Smith”) that is assigned to both troops. You just need to switch between Betty’s troop Merchant ID when you’re selling with Betty, and Sally’s troop when you’re selling with Sally.

- **If you have multiple girls and you use a Gmail account**, it’s easy to use an alias without having to create a new email address. Add any text after a “+” sign and all the mail goes to the same inbox, no set up required.
  - If your email address is TroopMom@gmail.com, you can use TroopMom+Sally@gmail.com and TroopMom+Betty@gmail.com without needing to do anything special in Gmail. Then one Clover account can be registered under TroopMom+Sally@gmail.com and one can be registered under TroopMom+Betty@gmail.com
Clover Go App
Safety First!

Rules for using Clover safely and securely

1. When using Clover, girls should always be supervised by a parent or adult troop volunteer

2. Girls need their parent or guardian’s permission to use Clover

3. Never share girls’ last names or personally identifiable information with customers
   • Only girls’ first name and last initial should appear on Clover receipts
   • Do not contact booth customers outside the booth context for any reason

4. Girls should never hand over their phone or tablet at any point during the transaction; girls should hold their device while customer signs or types in information during check-out

5. Only process a transaction if the customer’s card is in front of you to reduce the risk of compromising customer card details and to limit the risk of processing fraudulent cards
   • Don’t take payments over the phone or over email
   • Don’t take payments for anything other than Girl Scout Product Program items

Parents: By participating in Clover, you and your Girl Scout agree to follow the safety rules above as well as any additional Council guidelines, including the Safety Activity Checkpoints
Download the Clover Go App

Time to set up your Clover Go App

• Download the Clover Go App onto the smartphone or tablet your Girl Scout will use during the Cookie Program

• Open the Clover Go App and log in
  - Enter the email address and password that you created
  - Set up a quick-access numeric passcode that you will use for future logins
First Time User Experience

Accept Terms of Service
Allow push notifications (optional)
Share location
Create your desired 4-digit passcode
If using a Clover reader device, pair now, otherwise click Skip For Now

**Allowing share location is required for the app to work properly**
Prepare To Take An Order

The first time you use the app, it will land in Quick Mode. You will need to slide the toggle to switch to Inventory Mode. After the initial time, app will remember the last setting and open in Inventory Mode right away.
Tracking Cookie Booth Transactions

Pro Tip! For easy reporting, create/use a separate login that is just for Cookie Booth sales, making it easy to track booth transactions.

Configure Payment Note options (see next screen)

No need to require a payment note – turn this off

If you’re at a booth sale, enter the word “booth” as well as the location here (e.g. Walmart Booth).
To-Do List: Card reader should be charged overnight prior to each booth

Tap Card Reader

Make sure card reader is turned on and tap Pair Contactless + Chip Reader

The card reader that is on will be detected and listed as a selectable option

Note: A previously paired card reader should connect automatically to the same phone/tablet that it was paired to in the past. If not, you can always pair it as shown here.
Take An Order

Add items to your order by tapping on each item. Tap as many times as the number of items needed.

To change quantity or remove an item from the order, swipe left and select Edit or Remove.

This can be especially useful if large quantities of a single item are ordered.

Alternatively, you can tap on the caret to open up the cart and edit or remove items from there as well.
Checkout and Collect Payment

Once order is built, tap Checkout

**When using card reader:** To process a payment with the Clover Go Card Reader, you can swipe, dip, or tap right from this screen! You can enter a payment note here as well: Walmart Booth on 02.15.20

**When not using card reader device:** To process payment without Clover Go Card Reader, tap Key / Scan

Insert, Swipe, Tap and then follow the on-screen instructions
Collect Payment Using OCR Card Scan

- You will only be able to use OCR Card Scan if the toggle is set to Card Present.
- For security purposes, you should only run a transaction when the card is in front of you.
- Don’t ask your customers to share payments over the phone or online!

**Note:** The card number can be scanned in, but other information (CVV, Zip) will still need to be keyed.
Once the transaction completes, if signature is required, the signature screen will present.

**Note:** Signature is not always required, such as in the cases of Apple Pay transactions and even certain cards.

If Customer would like a receipt, you can
- Send via email
- Send via text
Or, you can complete without sending a receipt
Email/Text Receipts

Type the email address of the customer.

If this customer used the same card with you before, his/her email address or phone number may appear automatically. You can then either send to that address, or enter a new one.

The top 3 email extensions used by Clover Go users will be included as selectable options.
If Transaction Fails or is Declined

When using card reader: If card provided is unreadable, or a Transaction Failed message is received, you may need to key in the card number.

If Transaction Declined message is received, you will be taken back to the collect payment screen and should ask for a different card or a different form of payment.
Issuing a Refund

Refunds should only be issued for mistaken entries (i.e., charged for 3 boxes instead of 2) or charging the wrong credit card. If customer has a quality complaint or issue with their purchase, they should contact the Council directly.

- Open Transaction History
- Select transaction
- Click Issue Refund
- Refund can be for one, multiple or all boxes
Clover Go Reporting
Clover Reporting on the Web

- Go to Clover.com and login
- Select Reporting in the menu bar
- Reports available at summary and Girl Scout (employee) level
Click Employees tab to view sales by girl

<table>
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<tr>
<th>Name</th>
<th>Payments</th>
<th>Refunds</th>
<th>Manual Refunds</th>
<th>Service Charge</th>
<th>Tips</th>
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<tbody>
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<td></td>
<td>#</td>
<td>Amount</td>
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<tr>
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<td>$1.00</td>
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<td>$1,618.00</td>
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<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>
Pulling Reports in Excel

- Select Transactions from menu bar
- Search by range needed
- Click Export Payments from this page to download to Excel
Updating Clover Payments in eBudde

- Enter girl’s Clover payments in eBudde regularly
- Pull all transactions since your last update
- Report has details by individual User (email address or girl)
- If using Payment Notes to designate booth sales they will list in this report
- Add up Clover sales for each girl and apply Girl Payment in eBudde as you would cash/checks received (see TCM guide for instructions)
Clover Go Troubleshooting
Technology Requirements

Are there minimum phone or tablet operating system requirements?
The minimum operating system supported today is iOS 10 and Android 5

Does Clover Go Work over WiFi and Cellular Network?
Yes, Clover Go works over both Wi-Fi and Cellular Network

Does Clover Go work when there is no connectivity?
No. Accepting Offline Payments is not permitted in this Council so Clover Go will not work in offline mode, where there is no connectivity or when the device is in airplane mode

Why does the app ask me to enter my passcode again?
Clover Go has a 60 minute inactivity timeout, after which the application will log the user out and require them to enter their passcode to log back in. Any interaction with the app will reset the activity timer. Additionally, all sessions log out automatically at 3:00 am local time each day.
Managing Multiple Troops with Same Account

If you have more than one troop tied to your email address, you will be able to log in with one set of credentials and then switch between troops within the app with ease. Remember that each girl needs her own account to get proper credit for her sales.
Managing Multiple Girls with Same Phone

Girls can share the same phone, but must have their own Clover Go credentials (see troop setup section)

If you were the last person to use the app on this phone/tablet, your name should appear on this screen.

If you were not the last person to use the app on this device, select Switch User.

Click your user name from the list or tap + Add New User.

If adding new user, log in with Clover Go credentials to activate a new user on this phone/tablet.
Troubleshooting Tips

Clover Go has a 1-hour inactivity timeout as well as a session timeout. If you see a message like this, tap OK and re-enter your passcode.

- If a Transaction Declined message is received, you will be taken back to the collect payment screen and ask for another form of payment.
- If a Transaction Failed message is received, go back to the collect payment screen and select key in card or ask for another form of payment.
Troubleshooting Tips

Duplicate Transaction Detection

- Duplicate transactions can occur due to connectivity issues at the point of sale.
- If fields are identified as similar to a previous recent (within an hour) transaction then a notification is presented.
- User can chose to continue or cancel the current transaction.
- If desired, user can go to the settings icon, then tap transaction history and look at the prior transaction.

Address verification check

- Keyed card entries require an address verification check.
- A failure message will be presented if address verification fails.
- User will be alerted to the failure and given the option to continue or cancel the transaction.
- If they choose to continue with the transaction, the app will go to the next step, e.g. signature screen.
- If they choose to cancel the transaction, user will be returned to the collect payment screen where they can chose another form of payment or cancel the transaction.
Troubleshooting Tips

The first time you see a chip read failure message, check to make sure that you have inserted the card correctly, e.g. in the right direction.

The second time a chip read failure message is presented, you will be prompted to try swiping the card. If this fails as well, you can go back to the Collect Payment screen and either try to key in the card or ask for another form of payment.
Troubleshooting Tips

If your card reader is not working, you can try to reset it.

If no card reader is connected, user will be prompted to connect the card reader or cancel.

If card reader is connected, app will initiate the configuration process.

Note: If you are still experiencing issues with the card reader after completing this step, use the Call Me function and troubleshoot with a Clover Support agent.
Troubleshooting Tips

Initiating a request to have a Clover Support agent call you

- Make sure the name displayed is your name
- Make sure the phone # displayed is where you want the Clover Support agent to call you
- Select the reason for support from the list presented
- Select the language
- Tap Call Me

After call has been received and completed, tap Call Received. Or, to cancel a call before it has been received, tap Cancel Call.
Frequently Asked Questions

How long will it take to see funds in my account for cookies sold?
Your funds will be in your account in 24-48 hours.

How do I charge the reader and how long will it take?
You can charge the reader by connecting the accompanying USB cable to any power source. It will take around 1-2 hours to fully charge the reader, but this varies depending on your charging source (i.e. charging via a power socket vs charging via a USB plugged into a laptop or desktop). However, it is recommended that you charge the reader overnight prior to an event.

How many transactions can I process on a full charge?
It depends on the type and combination of transactions. Contactless transactions alone = roughly 130 transactions. EMV/Chip contact transactions (dipped) alone = roughly 160 transactions. Swiped transactions alone = roughly 160 transactions.

How long will the battery last?
Your experience may vary, typically, with a full charge, the Contactless + Chip reader will last for about 20 hours. Please note that in order to conserve the battery, your reader will automatically turn itself off after 15 mins of inactivity unless connected to the optional stand or a wall charger.

If I am not using the card reader, will it still lose charge?
Yes. There will be a low level battery drain. Over 3 months without using this card reader at all, the device would still support more than 15 EMV transactions and more than 50 swipe transactions.
Frequently Asked Questions

**How far can the reader be from the device and still work?**
Approximately 30 feet, with no obstacles in the way.

**How do I turn the Contactless + Chip card reader on and off?**
To turn on the reader, push and hold the power button on the reader until you see the blue LED light. To turn off the reader manually, push and hold the power button until the blue LED light turns off. The reader will also auto turn off after 15 minutes of inactivity. If the reader is turned off, simply turn the reader back on again and the reader will auto connect with the app. Or, open the Menu, then tap Card Reader to connect manually.

**Can I control the volume of the sound coming from the contactless + chip card reader?**
You can raise or lower the volume of the sound or mute it completely by using the sound volume controls on your phone or tablet.

**What is an Open Order?**
Open orders are a way to create and save an order, then process the payment at a later time. This feature also allows users to create an order on one Clover device and process the payment using the Clover Go app or vice versa.

**I did not create any Open Orders, so why am I seeing them?**
At this time, failed payments are also being saved as Open Orders and may explain why you are seeing these entries.
What if I still have questions?

Additional FAQs can be accessed via [https://help.clover.com/devices/clover-go/](https://help.clover.com/devices/clover-go/)

For questions about technical issues or problems with your Clover Go account or device, please call the **Clover support team** 24/7 at 855.276.5008

For questions on eBudde, Girl Scout policies or procedures, please contact the **Girl Scouts of Eastern Missouri Answer Center** at 314.400.4600 or answercenter@girlscoutsem.org